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| **UbD Unit Plan** | | | | | | | | | |
| **Title:** | Money, Money, Money!!!! | | | | **Subject/Course:** | | | Business / Computer Technology | |
| **Topic:** | | Maintaining My Account | **Grade:** | 10th/11th | | | **Designers:** | | Nan Nethery |
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| **Stage 1 – Desired Results** | | | | | | | | | |
| **Established Goals:**  Unit 8: Business Finance and Spreadsheet Applications  Competency 1: Manage A Checking Account   1. Complete a deposit slip 2. Prepare checks 3. Record information in a check register 4. Reconcile a bank statement 5. Explore on-line banking options   **Standards:**  **Academic:** A2 – Recognize, create, extend, and apply patterns, relations, and functions and their applications. **Workplace Skills:** WP6 – Employs thinking skills including creative thinking, decision making, problem solving, reasoning, and knowing how to learn. WP7 – Basic Skills: Employs basic academic skills including reading, writing, arithmetic and mathematics, speaking and listening. **National Educational Technology Standards for Students:** T1 – Basic operations and concepts. **National Standards for Business Education:** CP1 – Apply basic mathematical operations to solve problems. PF6 – Evaluate services provided by financial deposit institutions to transfer funds. | | | | | | | | | |
| **Understandings:**  *Students will understand the proper procedures of…*   * Completing a signature card * Completing a deposit slip * Preparing a check * Recording information in a check register * Reconciling a bank statement * Investigating online banking | | | | | | **Essential Questions:**   * Which bank is best for you? * What is the importance of accurately recording transactions? * What are the benefits of having a checking account? * What are the disadvantages of not having a checking account? | | | |
| *Students will know….*   * Recognize banking terminology * Maintain a checking account * Explain on-line banking options | | | | | | *Students will be able to….*   * Complete a signature card. * Complete a deposit slip. * Prepare a check. * Accurately record transactions in a check register. * Balance a checkbook to a bank statement. * Research online banking options. | | | |

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| **Stage 2 – Assessment Evidence** |
| **Performance Task:** *Summary in GRASPS form*  **Goals:** Manage a checkbook in order to become a effective personal money manager  **Role:** You are a new customer of a community bank.  **Audience:** Bank officers/employees  **Situation:** You are a new customer of a local community bank. You must maintain your checking account by making deposits, writing checks, recording each transaction in your register, and balancing your account at the end of the month.  **Performance:** You will complete and record each transaction given in the practice sets. You will research/compare three different local financial institutions to see which one would offer you the most. You must prepare a chart comparing the three banks. You must then write a short essay explaining your choice.  **Standards:**   1. Your completed simulation practice sets need to:  * Balance to the penny * Be neat and legible  1. Your comparison chart needs to include:  * Types of checking accounts offered * Minimum balance required * Monthly service charge * Interest earned * Bill pay * Debit card availability * Overdraft Protection * Number of local branches  1. Your summary essay needs to include:  * What you like most about the bank you chose * Why is this the bank for you * Why you would recommend it to someone else |
| **Key Criteria:**   * Students’ work (practice sets) is completely accurate and computations are correct. * Checklist for chart comparing banks and short essay |
| **Other Evidence**   * Teacher observation of students working on tasks. * Assessment of student work. * Assess understanding through class conversation and questioning. * Orally review unit terms. * Written test |

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| **Stage 3 – Learning Plan** |
| **Learning Activities** *Consider the WHERETO elements*  W – where, why H – hook, E – equip, R – rethink, reflect, revise, E – evaluate and self-assess, T – tailor to reflect individual styles, O – organize to optimize deep understanding  **See Daily Lesson Plans** |
| **Resources** |
| My Checking Account simulation/workbook  Notes from simulation/workbook on personal banking (PowerPoint presentation)  Essay checklist  Brochures from local community banks  Local Community Bank websites:  [www.renasantbank.com](http://www.renasantbank.com) [www.southbank.com](http://www.southbank.com)  [www.trustmark.com](http://www.trustmark.com) [www.commercenationalbank.com](http://www.commercenationalbank.com)  [www.regence.com](http://www.regence.com) [www.bancorpsouth.com](http://www.bancorpsouth.com)  [www.citizensbank.com](http://www.citizensbank.com)  Calculators  Samples of different styles of checks  Samples of real bank statement and reconciliation forms |
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